Manage System Accounts Version 1.09.02.0 External User's Mini User Guide

New Features

Overview

There is the functionality to manage system accounts based on assigned user roles. Users with system accounts are able to retrieve eRA documents such as the grant image via the eRA document web service. Managing system accounts can be accomplished via the Account Management System (AMS) in Commons.

The following system account functions can be performed:

- Search Account
- View Account
- Edit Account (Edit Account Information, Delete Role(s), Add Role(s))
- Create Account

User Roles

- SIGNING OFFICIAL (SO)
    - This role gives users the ability to search/create/edit system accounts within their institutions.

Accessing Accounts to Manage System Accounts

1. To create a system account, log into Commons at http://commons.era.nih.gov/commons.
2. Click on the **Admin** tab → the **Accounts** tab → the **Manage Accounts** tab.

For more information on logging into Commons, please refer to the Commons user guide.

Successful Login and Access

When the **Manage Accounts** tab is clicked, the system displays the *Search Accounts* screen in a separate browser window.

1. From the drop-down menu for **User Types**, select *System* to view the *Search Accounts* screen for searching for the system user type.

NOTE: The APPLICANT RETRIVAL DATA SERV role appears on all account screens.

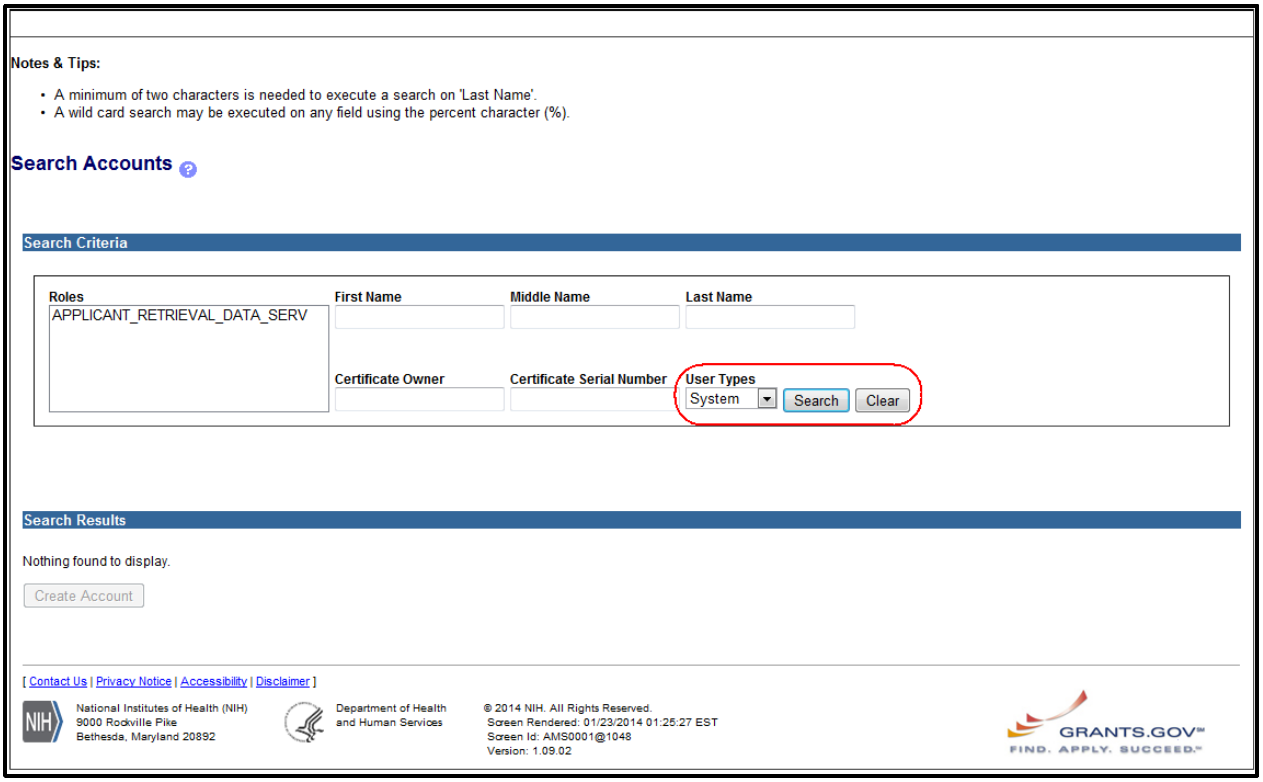


Figure 1: Search Accounts Screen Displaying the System Role

NOTE: The **Create Account** button only appears after a search is executed.

Search Account

1. To search for an account, enter the appropriate search criteria.

Last Name requires a minimum of two characters. Upper or lower case may be used. A wild card character (%) may be used to search for string patterns on any field.

NOTE: The APPLICANT RETRIVAL DATA SERV role is available to search on for users with the SO role. This role allows users with system accounts to be able to retrieve eRA documents such as the grant image via the eRA document web service.

2. Click the **Search** button to execute the search or click the **Clear** button to clear the search criteria.

When the **Search** button is clicked, the system displays the *Search Accounts* screen with the *Search Results* in a hit list.

NOTE: Users with the SO role can view/edit all system accounts for their respective Institutions.

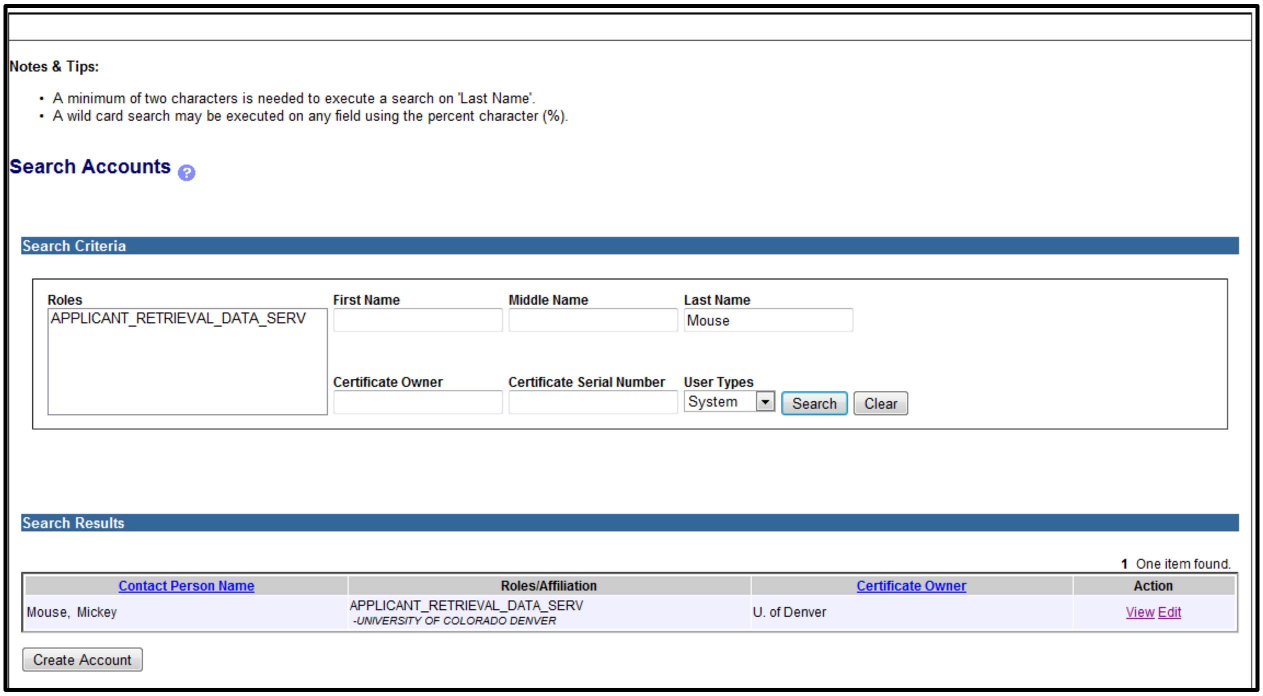


Figure 2: Search Accounts Screen Displaying Search Results per SO's Institution

The search results can be sorted by clicking the **Contact Person Name** hyperlink or the **Certificate Owner** hyperlink. The default sort is ascending. By clicking the appropriate hyperlink a second time, the system sorts the search results in descending order. The two sorts are mutually exclusive of each other.

Create Account

1. To create a system account, click the **Create Account** button at the bottom left corner of the *Search Accounts* screen.

NOTE: The **Create Account** button only appears after a search is executed.

When the **Create Account** button is clicked, the system displays the *Create Account* screen with no entry on the user type field.

2. Select *System* for **User Type** on the *Create Account* screen.

When *System* is selected for **User Type**, the *Create Account* screen displays the appropriate fields that need to be completed for a system account.

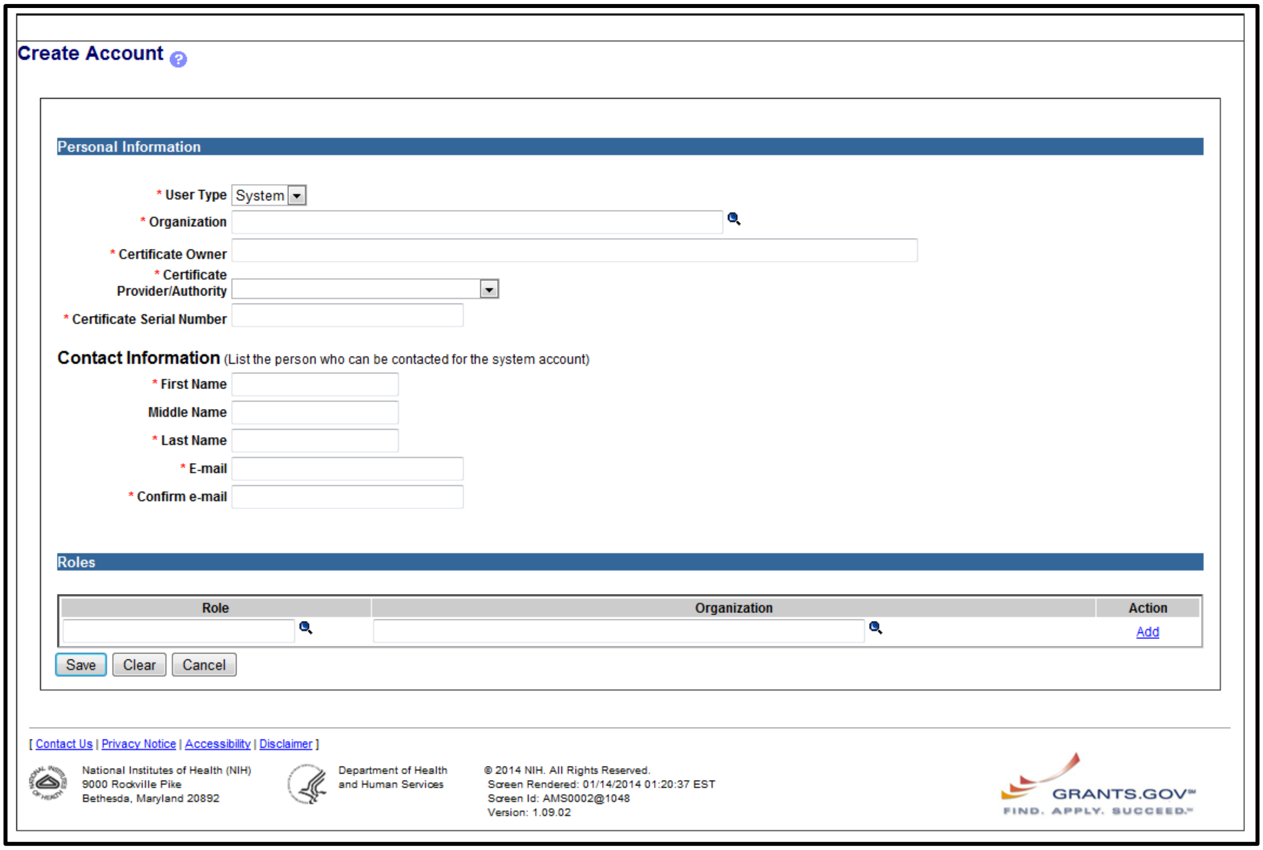


Figure 3: Create Account Screen with System User Type Selected

NOTE: For users with the SO role, the institution's name is pre-populated with their respective Institution.

3. Type in the owner in the **Certificate Owner** field. The **Certificate Owner** is the organization who acquired the certificate.
4. Select the appropriate **Certificate Provider/Authority** from the drop-down menu.

NOTE: Examples of values that are available for the Certificate Provider/Authority include: *Comodo*, *Digicert*, *Entrust*, *Geo Trust*, *Go Daddy*, *InCommon*, *Thawte*.

5. Type in the **Certificate Serial Number**.

NOTE: The **Certificate Serial Number** format is XX:XX:XX:XX:XX:XX:XX:XX.

6. Complete the *Contact Information*.
7. For the **Role** field in the *Roles* section, click the **magnifying glass** icon.

When the **magnifying glass** icon is clicked, the system displays the *Select Role* screen.

   a. Click the **Select** hyperlink on the *Select Role* screen.

NOTE: For SO users, the APPLICANT RETRIVAL DATA SERV role appears on the *Select Role* screen.

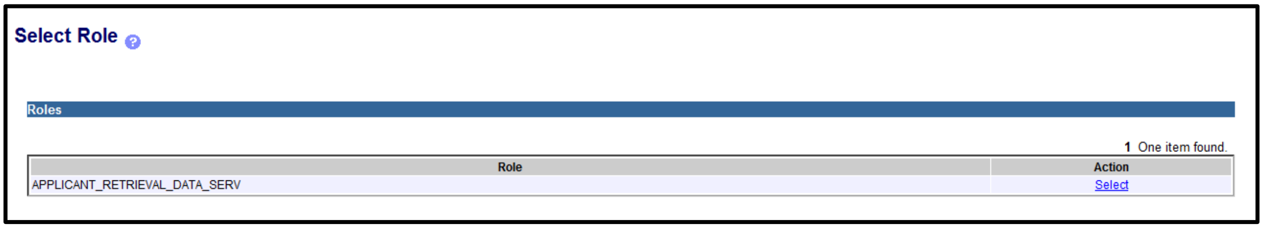


Figure 4: Select Role Screen

When the **Select** hyperlink is clicked, the system returns to the *Create Account* screen.

8. Click the **Add** button to add the selected role with organization/institution to the system account.
9. Perform one of the following options on the *Create Accounts* screen:
    a. Click the **Save** button to save the changes.
    b. Click the **Clear** button to clear the fields.
    c. Click the **Cancel** button to return to the *Search Account* screen.

The system performs validations when the **Save** button is clicked. Please refer to the *Error Messages* topic for more information. If there are no error messages, then the system displays the *Create Account Confirmation* screen with the following message: *Account was successfully created*.

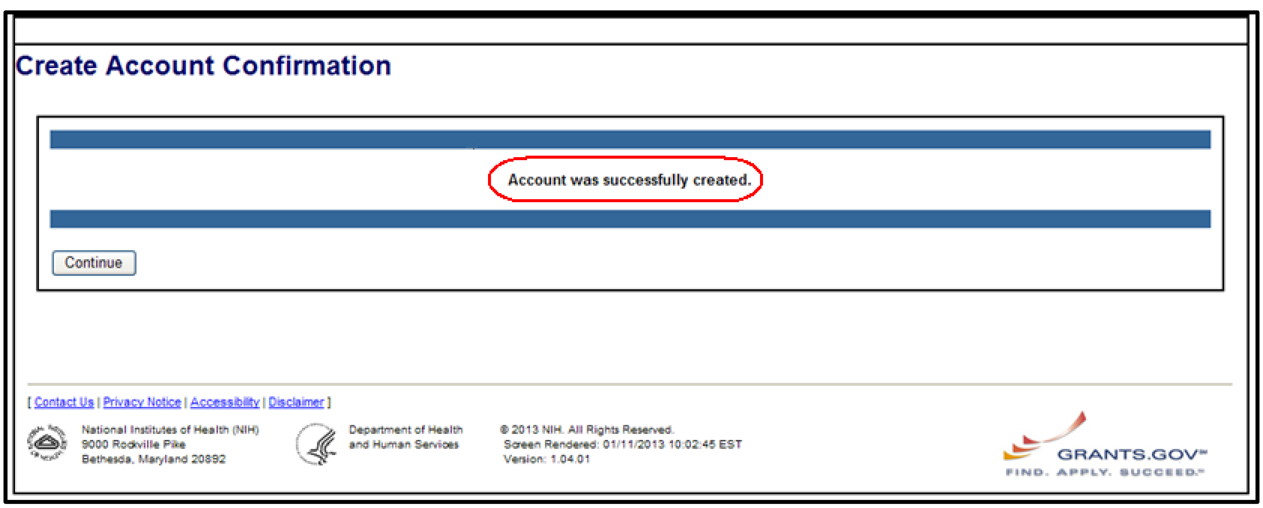


Figure 5: Create Account Confirmation Screen

8. Click the **Continue** button to return to the *Search Accounts* screen.

When the **Continue** button is clicked, the system displays the *Search Accounts* screen with the new account created being displayed and sends an email notification to the contact person of the system account. Please refer to the *Email Notifications* topic for more information.

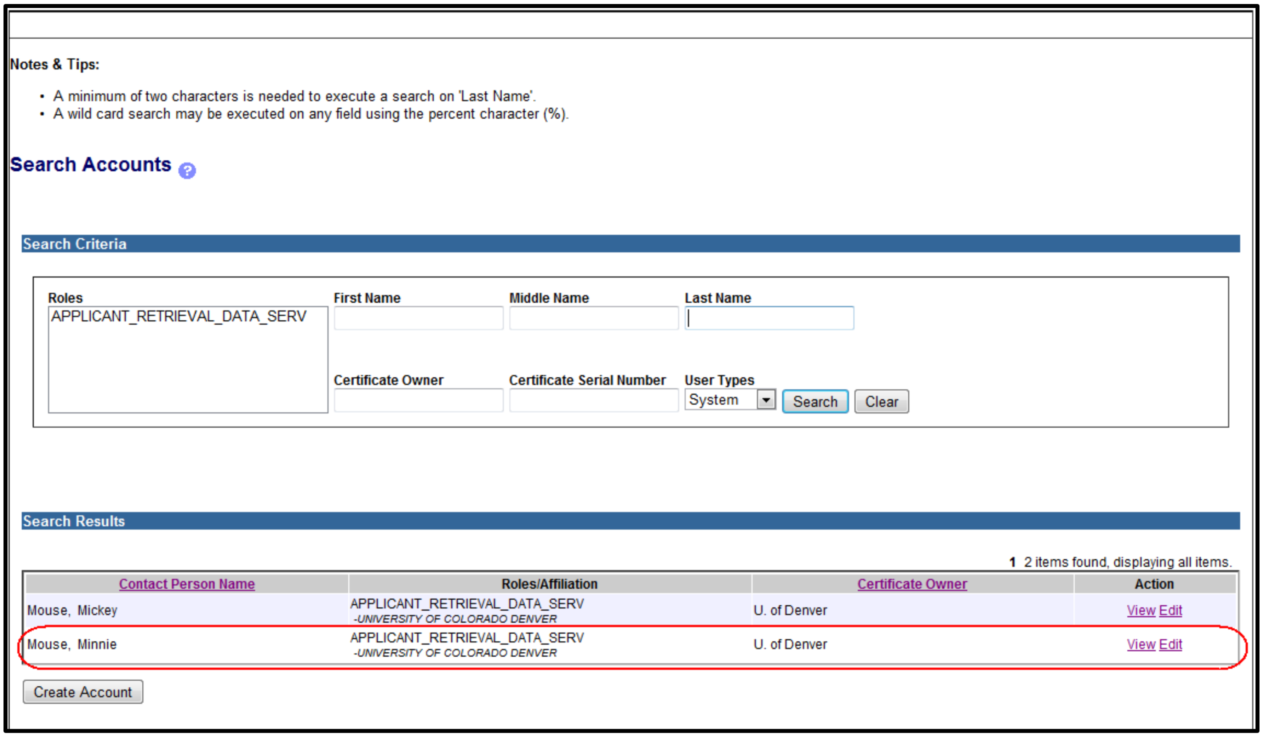
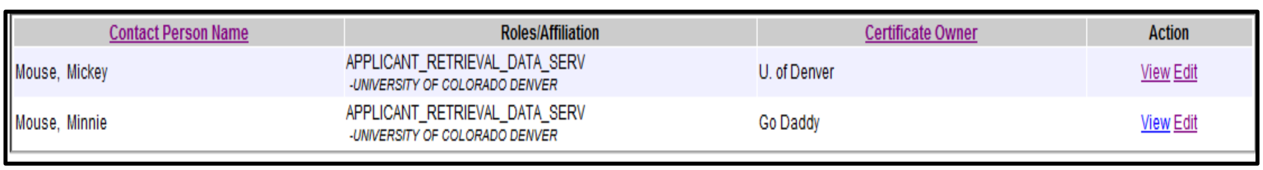


Figure 6: Search Accounts Screen Displaying Newly Created Accounts

View Account



Contact Person Name	Roles/Affiliation	Certificate Owner	Action
Mouse, Mickey	APPLICANT_RETRIEVAL_DATA_SERV -UNIVERSITY OF COLORADO DENVER	U. of Denver	View Edit
Mouse, Minnie	APPLICANT_RETRIEVAL_DATA_SERV -UNIVERSITY OF COLORADO DENVER	Go Daddy	View Edit

Figure 7: Search Accounts Screen Search Results Displaying the View Hyperlink

1. To view an account, click the appropriate account's **View** hyperlink in the *Search Results* section on the *Search Accounts* screen.

When the **View** hyperlink is clicked, the system displays *View Account* screen.

2. Click the **Cancel** button to exit the screen.

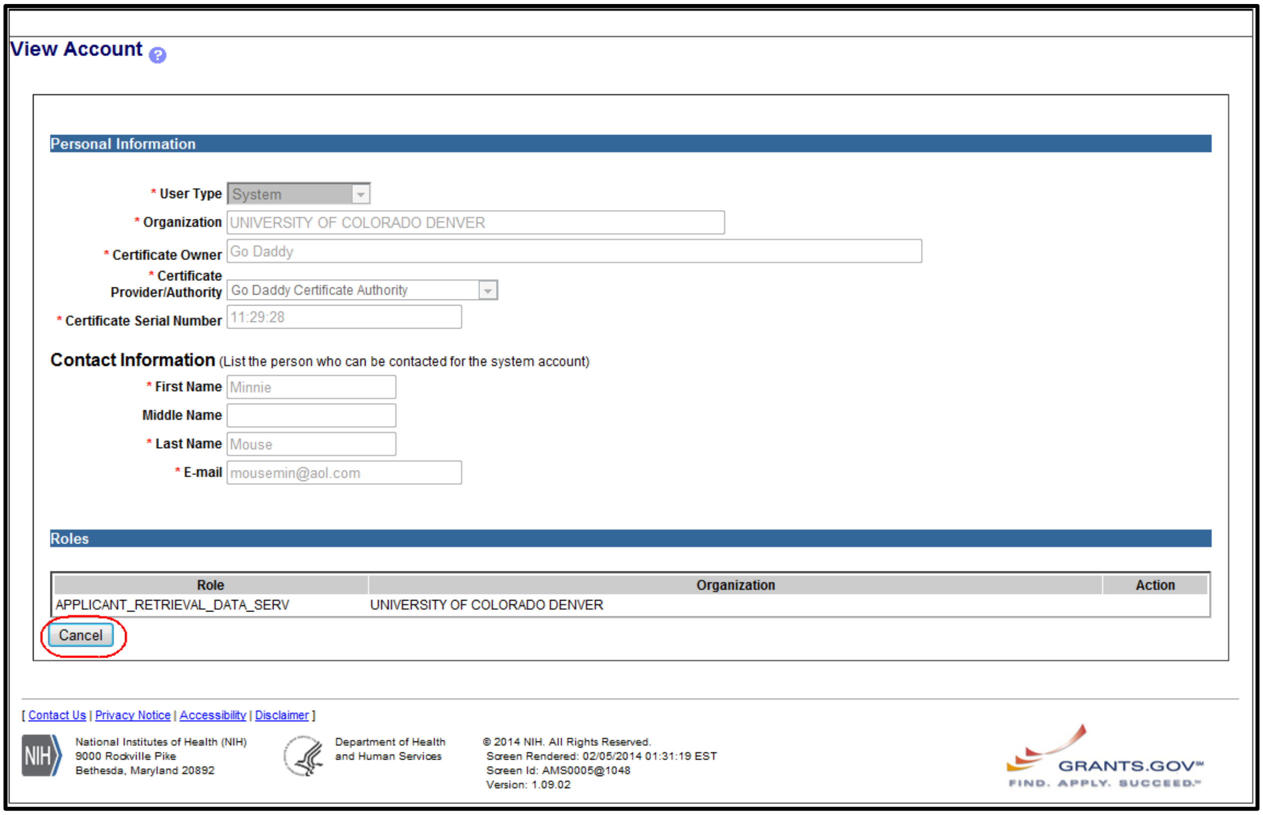


Figure 8: View Account Screen

Modify Account

Contact Person Name	Roles/Affiliation	Certificate Owner	Action
Mouse, Mickey	APPLICANT_RETRIEVAL_DATA_SERV *-UNIVERSITY OF COLORADO DENVER*	U. of Denver	View Edit
Mouse, Minnie	APPLICANT_RETRIEVAL_DATA_SERV *-UNIVERSITY OF COLORADO DENVER*	Go Daddy	View Edit

Figure 9: Search Accounts Screen Search Results Displaying the Edit Hyperlink

1. To edit an account, perform a search on the *Search Accounts* screen.
2. Click the **Edit** hyperlink for the appropriate account to be edited.

When the **Edit** hyperlink is clicked, the system displays the *Modify Account* screen.

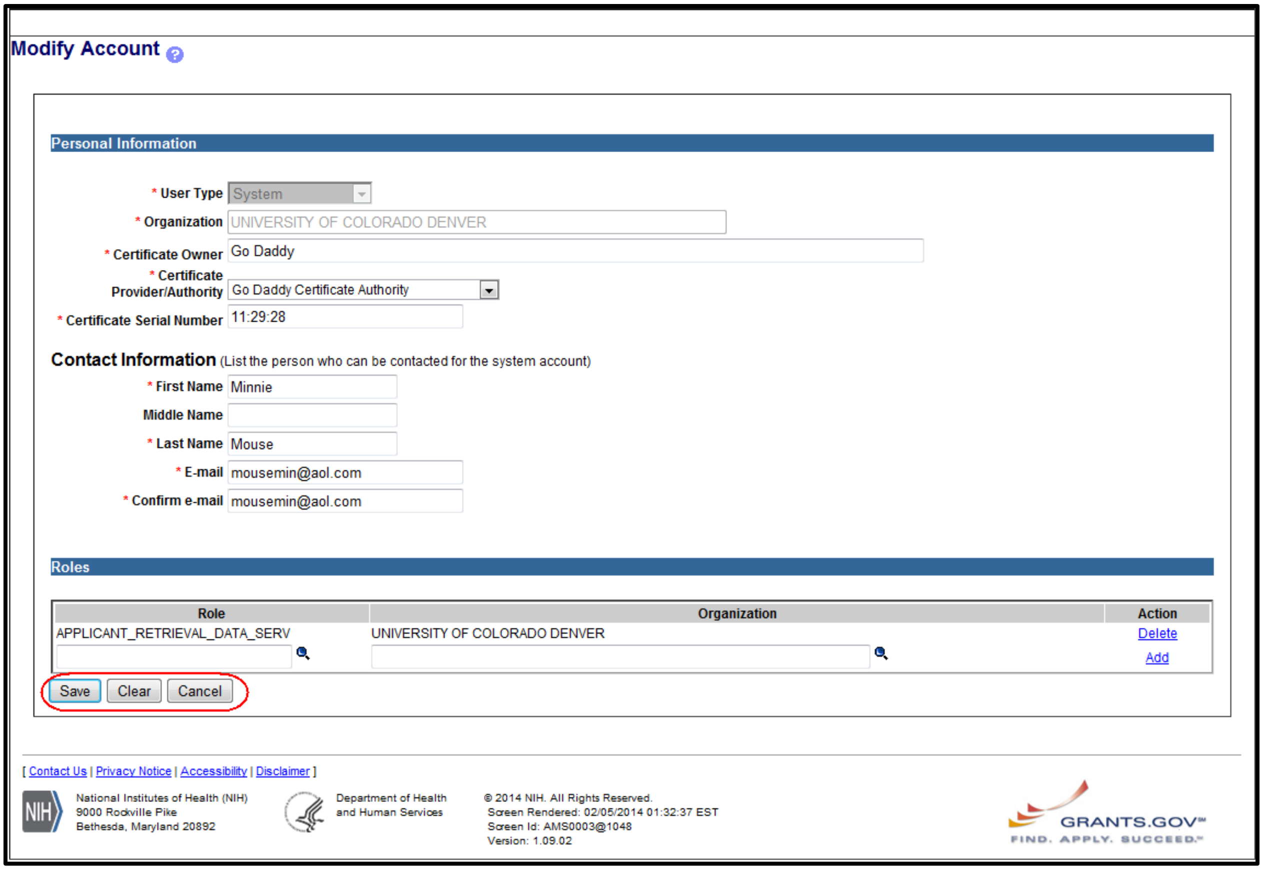


Figure 10: Modify Account Screen

3. If desired, make the appropriate edits in the *Personal Information* and/or *Contact Information* section.

NOTE: The **User Type** and **Organization** fields are not editable.

4. To delete a role, click the **Delete** hyperlink for the appropriate role.

When the **Delete** hyperlink is clicked, the system deletes that role from the list of roles assigned to that system account.

NOTE: A system account should have at least one role. If all roles are deleted from a system account, the system account becomes deactivated. Only active system accounts appear on the *Search Accounts* screen.

5. Perform one of the following options:
   a. When all edits are complete, click the **Save** button.
   b. Click the **Clear** button to clear out the edits and restore the previous data.
   c. Click the **Cancel** button to cancel the edits and return to the *Search Accounts* screen.

When the **Save** button is clicked, the system performs validations. Please refer to the *Error Messages* topic for more information. If there are no error messages, the changes are saved and the following message is displayed: *The account has been successfully updated (ID: 200533)*.

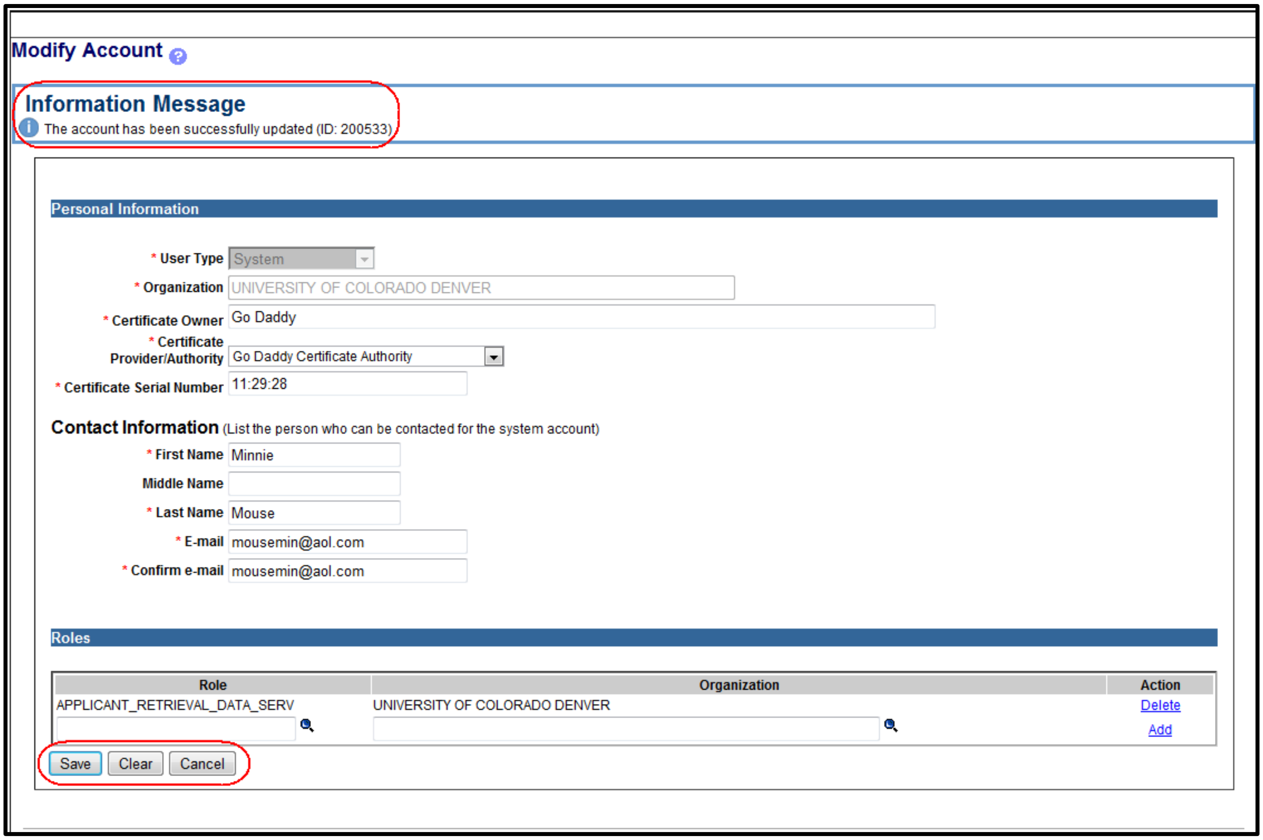


Figure 11: Modify Account Screen Displaying Saved Account Message

6. After the updates have been saved, click the **Cancel** button to close the *Modify Account* screen and return to the *Search Accounts* screen.

Email Notifications

NOTE: Currently email notifications are only being sent when a new system account is created.

Create New Account

***** This is an automated notification - Please do not reply to this message. *****

First Name Last Name,

An eRA system account has been created and registered with the provided certificate serial number on MON DD, YYYY by <user’s name>. The system account details are:
- Certificate Owner: <name>
- Role(s) that are assigned to this account: <Role Name>;

For additional information, please refer to the details at <Website URL>. If you have any questions about the creation of this account or level of access, contact your administrator at: <Administrator's email address>.

Error Messages

Search Errors

If the system determines that the query result exceeds the 500 record limits, then the system displays the following error message:

> ***The query has returned more records than the limit allowed by maximum query result size. Please redefine your query parameters. (ID: 22102)***

If the system determines that at least two characters were not entered in the **Last Name** field, then the system displays the following error message:

> ***You must search on at least two characters of the Last Name (ID: 200528)***

Create/Edit Account Errors

If the system determines that the **Certificate Serial Number** is invalid, then the system displays the following error message:

> ***The Certificate Serial Number format is invalid. It should be provided in the "xx:xx:xx:xx:xx:xx:xx:xx" format where the number of xx can be varied depending on the certificate provider.***

If the system determines that the certificate has been associated with an existing account, then the system displays the following error message:

> ***The provided Certificate Serial Number has been mapped to an existing account. Please provide another Certificate Serial Number to create this system account.***